NEW HAMPSHIRE'S AGRITOURISM SURVEY
OVERVIEW/SUMMARY

Methodology

A questionnaire was developed (copy in Appendix) and administered to a sample of 400 New Hampshire visitors and 400 out-of-state visitors. Interviews were conducted in person at various NH Rest Areas/Visitor Centers and at the Lakes Region Factory Outlet Stores on weekends between July 20 and August 10, 2002.

Report Format

This report presents survey data for two groups of respondents - NH visitors and Out-of-State Visitors. The notation (n=) is used to indicate the number of people responding to each question and the base upon which survey statistics were calculated.

Major Research Findings

1. In terms of relative importance to the enjoyment of their NH visit, visitors rated "open space" relatively high and "pick-your-own facilities" relatively low.

2. Approximately one-third of visitors interviewed indicated that they did/will purchase NH-Grown/Made agricultural products during their current trip. Out-of-state visitors reported a higher incidence of purchasing fresh vegetables and specialty/ processed foods than their NH counterparts. Most visitors reported purchasing such products at farmer's markets/farm stands.

3. Of those not purchasing NH-Grown/Made agricultural products, two-thirds of the NH visitors cited "no interest/need" as the primary reason while over half of the out-of-state visitors cited not knowing where to purchase them.

4. The likelihood of visitors increasing their level of purchases of NH-Grown/Made agricultural products seems more directly related to wider product availability and "promotion".

5. Pricing did not seem to be a major issue - in fact, almost two-thirds of NH visitors and almost half of out-of-state visitors indicated a willingness to pay a "premium" for NH-Grown/Made agricultural products (typically 10%) for reasons such as "freshness" and "providing a better value". "Supporting the local economy" was considerably more important to NH visitors than their out-of-state counterparts.

6. In terms of agritourism "experiences", participation and future interest in activities such as "apple/berry picking" and "sleigh/hay rides" were noticeably higher than "farm stays/tours" or "cider making". New Hampshire visitors reported a level of participation twice as high and levels of future interest noticeably higher than their out-of-state counterparts.

DEMOGRAPHICS OF SURVEY RESPONDENTS

Annual Household Income

As indicated in Table 1, out-of-state visitors reported higher annual household incomes than NH visitors with almost half reporting $75,000 or greater.

Table 1
Distribution of Survey Respondents by
Annual Household Income

Income Group	NH Residents (n= 401)	Out-of-State Residents (n=387)

Less than $20,000	2.7%	1.8%
$20,000-$34,999	7.2	7.2
$35,000-$49,999	21.7	21.2
$50,000-$74,999	35.0	23.3
$75,000-$99,999	25.0	27.4
$100,000-$149,999	7.7	16.0
$150,000 or more	.7	3.1
	100.0%	100.0%

Age

Out-of-state visitors were reportedly also older than their NH counterparts. Table 2 summarizes the responses which indicate that about half were age 50 or older.

Table 2

Distribution of Survey Respondents by Age Group

Age Group	NH Residents (n= 413)	Out-of-State Residents (n=393)
18-24	7.0%	3.8%
25-34	18.2	12.5
35-49	37.0	32.5
50-64	23.7	25.2

65 or more	14.1	26.0
	100.0%	100.0%

Gender

Table 3 presents the distribution of sample respondents by gender. As can be seen, while the ratio is 60/40 for females in the NH visitor sample, it is almost the reverse for the out-of-state visitor sample.

Table 3
Distribution of Sample Respondents by Gender

	NH Residents (n= 410)	Out-of-State Residents (n=399)
Male	40.2%	53.4%
Female	59.8	46.6
	100.0%	100.0%

TRAVEL PARTY INFORMATION

Respondents were asked a few initial questions to obtain a travel party "profile".

Distance from Primary Residence

As indicated in Table 4, NH visitors reportedly had traveled an average of 55 miles from their primary residence while out-of-state visitors reportedly had traveled an average of 360 miles.

Table 4
Miles from Primary Residence

Miles	NH Residents (n=386)	Out-of-State Residents (n=288)
25 or less	16.0%	3.4%
26-50	42.0	11.1
51-100	35.0	26.8
101-200	6.5	27.5
201-500	.5	12.8
501-1000	-	8.7
Over 1000	-	9.7
	100.0%	100.0%
Mean # miles	55	360

Travel Party Size

As indicated in Table 5, the average travel party size was slightly larger for out-of-state visitors (3.0) than for NH visitors (2.7).

Table 5
Mean Travel Party Size

	NH Residents (n=418)	Out-of-State Residents (n=405)
Adults	2.0	2.4
Children	.7	.6
Total	2.7	3.0

NH Travel Patterns

Out-of-state visitors reported spending an average of 3.8 days in New Hampshire on their current trip and making an average of 3.4 trips to New Hampshire each year.

In-state visitors reported making an average of 17 trips within New Hampshire each year for vacation or pleasure.

NEW HAMPSHIRE AGRICULTURE

The next series of questions were designed to gauge the relative importance of agriculture-related factors to visitors' enjoyment of New Hampshire, document the incidence of purchasing agriculture products while visiting the state as well as the factors that might be likely to increase future purchases.

NH Enjoyment Factors

Respondents were first asked about the relative importance of various agritourism factors to the enjoyment of their New Hampshire visit. Table 6 summarizes the responses which indicate that "open space" was rated of highest relative importance and "pick-your-own facilities" of lowest relative importance.

Table 6
Importance of Agriculture-Related Factors in
Enjoyment of NH Visit
(Scale: 1 to 5, where 5 = Very Important)

Factor	NH Residents (n=418)	Out-of-State Residents (n=402)
Open space	4.6	4.5
Farms, orchards, etc.	4.3	3.6
Farmer's markets, farm stands, etc.	4.2	3.9
Pick-Your-Own facilities	3.7	3.0

Incidence of Purchasing NH-Grown/Made Products

Visitors were asked whether they did/will purchase New Hampshire-grown/made agricultural products (fruits/vegetables, specialty/processed foods, flowers/plants, trees/shrubs) while on their current trip. Table 7 summarizes the responses which indicate that approximately one-third of all visitors responded "Yes". A similar percentage of out-of-state visitors responded "not sure” which undoubtedly reflects that they were interviewed early during their visit to New Hampshire.

Table 7
Incidence of Purchasing NH-Grown/Made
Agricultural Products on Current Trip

	NH Visitors (n=418)	Out-of-State Visitors (n=402)
Yes	32.5%	35.3%
No	58.9	31.6
Not sure	8.6	33.1
	100.0%	100.0%

Reasons for Non-Purchase

Visitors responding “No” or “Not Sure” to the question on purchasing NH-Grown/Made agricultural products were asked about their reasons. As indicated in Table 8, while two-thirds of NH visitors reported “no need/interest”, over half of the out-of-state visitors reported they were not aware of the origin of products. Another 15-20% of visitors reported not knowing where to purchase such products.

Table 8
Reason for Non-Purchase

Reason (n=255)	NH Residents (n=204)	Out-of-State Residents
No interest/need	69.0%	39.2%
Not aware of origin of products	16.5	53.9
Don’t know where to purchase	21.5	14.9
Other	10.2	3.9

Note: percentages add to more than 100% due to multiple mentions

Purchase of Specific Types of Agricultural Products

Those who indicated they purchased or intended to purchase NH-Grown/Made agricultural products were then asked to specify which types. Again, multiple responses were allowed and as indicated in Table 9, out-of-state visitors reported higher incidences of purchasing fresh vegetables and specialty/processed foods than their in-state counterparts.

Table 9

Incidence of Visitors Purchasing
Specific Types of NH-Grown/Made Products

Product type	NH Residents (n=135)	Out-of-State Residents (n=142)
Fresh vegetables	68.1%	76.8%
Fresh fruits	71.1	68.3
Specialty/processed foods	35.6	52.1
Flowers/plants/shrubs	17.0	12.7
Other	3.7	7.7

Note: percentages add to more than 100% due to multiple mentions

Mean Expenditures for Agricultural Products

These same group of purchasers were next asked approximately how much they spent on various types of NH-Grown/Made products on their current trip. Average expenditures have been calculated and are presented in Table 10 for the small group of respondents providing complete information. It is noticeable that out-of-state visitors reportedly spent considerably more on agricultural-related products.

Table 10

Mean Expenditures for Those Purchasing
Agricultural Products

Product Type	NH Residents (n=)	Out-of-State Residents (n=)
Fresh fruits/vegetables	$18.88 (107)	$30.70 (107)
Flowers/plants/shrubs	7.54 (21)	7.12 (15)
Specialty/processed foods	7.09 (36)	50.19 (78)
Total Spending	$33.51	$88.01

Types of Retail Establishments

A related question for those making purchases of agricultural-related products asked about the relative use of different types of retail establishments. As can be seen in Table 11, most people reported purchasing at farmer's markets or farm stands.

Table 11
Use of Various Retail Establishments

	NH Residents	Out-of-State Residents
Fresh fruits/vegetables:	(n=107)	(n=107)
Grocery/convenience stores	19.6%	23.8%
Farmer's Markets/Farm stands	76.2	70.0
Pick-Your-Own facilities	3.2	5.5
Other	1.0	.7
	100.0%	100.0%
Specialty/Processed Foods:	(n=36)	(n=78)
Grocery/convenience stores	24.5%	37.8%
Farmer's Markets/Farm stands	45.4	49.7
Pick-Your-Own facilities	3.7	.5
Other	26.4	12.0
	100.0%	100.0%
Flowers/Plants/Shrubs:	(n=21)	(n=15)
Grocery/convenience stores	7.1%	7.7%
Farmer's Markets/Farm stands	64.3	39.0
Pick-Your-Own facilities	4.8	-
Other	23.8	53.3
	100.0%	100.0%

Likelihood of Increased Future Purchases

All respondents were asked to indicate the relative likelihood that they might increase purchases of NH-Grown/Made agricultural products if certain conditions/factors existed. Responses are summarized in Table 12 and indicate that increased future purchases were somewhat more likely to be a function of wider product availability and "promotion".

Table 12
Likelihood of Increasing Future Purchases of
NH-Grown/Made Agricultural Products if
Certain Conditions Applied
(Scale: 1 to 5, where 5 = Very Likely)

Condition	NH Visitors (n=417)	Out-of-State Visitors (n=400)
Products were available in more locations	4.3	4.1
Increased awareness of existence/ location of Farmer's Markets, Farm Stands, Pick-Your-Own Facilities, Nurseries, etc.	4.2	4.0
Products were more clearly labeled, providing easier recognition of NH-Grown/Made products	4.1	3.8
Prices were more competitive with		

other products	4.1	3.7

Willingness to Pay Extra

All respondents were also asked if they'd be willing to pay extra for NH-Grown/Made agricultural products and, if so, how much of a "premium" they would be willing to pay. Table 13 summarizes the responses which indicate that a substantial percentage (65% of NH visitors and 46% of out-of-state visitors) reported a willingness to pay extra. In both cases, the average "premium" was reportedly 9-10%.

Table 13
Willingness to Pay Extra for NH-Grown/Made
Agricultural Products

	NH Visitors (n=415)	Out-of-State Visitors (n=394)
% indicating "Yes"	64.6%	46.4%
% "Premium" Willing to Pay	(n=248)	(n=163)

5% or less	38.3%	33.7%
6-10% 46.8	43.6	
11-15%	7.2	12.9
16-20%	7.2	8.6
More than 20%	.5	1.2
	100.0%	100.0%
Average "Premium"	10.0%	8.9%

Reason(s) Willing to Pay Extra

Those indicating a willingness to pay extra for NH-Grown/Made agricultural products were asked for about their reasons which are summarized in Table 14. As can be seen, the primary reasons cited by both visitor groups were "fresher" and "better value". "Supporting the local economy" was reportedly much more important to NH visitors than those from out-of-state.

Table 13

Reasons Willing to Pay Extra for
NH-Grown/Made Agricultural Products

Reason (n=233)	NH Visitors (n=163)	Out-of-State Visitors
Fresher	84.5%	80.2%
Support local economy	73.8	37.1
Better value	41.2	55.7
Other	5.6	9.0

Note: percentages add to more than 100% due to multiple mentions

NEW HAMPSHIRE AGRICULTURAL "EXPERIENCES"

A final section of the survey asked visitors to indicate whether they had participated in certain agricultural-related activities while in New Hampshire and their relative interest in participating in such activities in the future. Tables 14 and 15 summarize the responses which indicate that, in general, NH visitors were twice as likely to have participated in such activities than their out-of-state counterparts. More specifically, participation/future interest in “apple/berry picking” and “sleigh/hay rides” was noticeably higher than for “farm stays/tours” or “cider making”.

Table 14

Incidence of Participating in NH Agricultural “Experiences”

“Experience”	NH Visitors (n= 418)	Out-of-State Visitors (n=405)
Apple/Berry picking	38.5%	19.3%
Sleigh/Hay rides	26.1	10.1
Farm Stay/Tours	17.0	8.1
Cider making	14.6	6.7

Table 15

Future Interest in NH Agricultural “Experiences”

(Scale: 1 to 5, where 5 = Very Interested)

“Experience”	NH Visitors (n= 400)	Out-of-State Visitors (n=377)
Sleigh/Hay rides	3.8	3.3
Apple/Barry picking	3.7	3.2
Farm Stay/Tours	3.4	3.1
Cider making	3.3	2.9

NEW HAMPSHIRE VISITOR SURVEY

AGRICULTURAL PRODUCTS/SERVICES

The New Hampshire Department of Agriculture is conducting research on the role played by agricultural products and services in the typical visitor experience while in New Hampshire. Your participation in this short survey will be greatly appreciated.

TRAVEL PARTY INFORMATION

1. Are you a...

   ____ NH Resident ____" Visitor to New Hampshire ____Just passing through (terminate)

2. Approximately how many miles are you from your primary residence? ______

3. How many people are in your travel party on this trip?

   # adults ______
   # children ______
   Total ______

4. Visitors:

   How many days will you spend in New Hampshire on this trip? ______

   How many trips do you typically make to New Hampshire each year? ______

   Residents:

   How many trips (traveling at least 25 miles) do you typically make within New Hampshire each year for vacation/pleasure? ______

NH AGRICULTURE

5. How important are the following factors to the enjoyment of your New Hampshire visit? Using a scale of 1 to 5, where "5" = "Very Important", please circle the number that

represents the importance of each factor to you.

	Importance Scale				
	Not at All				Very
Open space	1	2	3	4	5
Farmers' markets, farm stands, etc.	1	2	3	4	5
Farms, orchards, etc.	1	2	3	4	5
Pick-Your-Own facilities	1	2	3	4	5
Other:________________________________	1	2	3	4	5

6. During this trip in New Hampshire, did/will you purchase **New Hampshire-grown/made** agricultural products (fruits/vegetables, specialty/processed foods, flowers/plants, trees/shrubs)?
____Yes
____ No
____ Not sure
If "No" or "Not Sure", please explain by checking appropriate box(es) below and then skip to #9.
____ No interest/need
____ Not aware of origin of products
____ Don't know where to purchase such products
Other:____

7. If ("Yes") Which of the following types of **New Hampshire-grown/made** products did/will you purchase while in New Hampshire? Please check all that apply.

____ Fresh Fruits
____ Fresh Vegetables
____ Specialty/processed foods - ice cream/yogurt, jams/jellies, condiments, baked goods, etc.
____ Flowers/plants, trees/shrubs, etc.
____ Other (please specify):____

8. Approximately how much did/will you spend on the following types of NH grown/made products on this trip?

What percentage was bought from each of the various types of establishments?

	Fresh Fruits/ Vegetables	Specialty/ Processed Foods	Flowers/ plants, trees/shrubs
Expenditures - NH products	$________	$________	$________
% from...			
Grocery/Convenience Stores	_______%	_______%	_______%
Farmers' Markets/Farm Stands	_______%	_______%	_______%
Pick-Your-Own facilities	_______%	_______%	_______%
Other:______________________	_______%	_______%	_______%
Total	100%	100%	100%

9. Using a scale of 1 to 5, where "5" = "Very Likely", how likely would you be to increase your future purchases of **New Hampshire-grown/made** agricultural products if…

	Not at all likely				Very Likely
Products were more clearly labeled, providing easier recognition of "NH-Grown/Made" products	1	2	3	4	5
There was increased awareness of existence/ location of Farmers' Markets, Farm Stands, Pick-Your-Own, Nurseries, etc.	1	2	3	4	5
Products were available in more locations	1	2	3	4	5

Prices were more competitive with other products	1	2	3	4	5
Other conditions:___________________________	1	2	3	4	5

10. Are you willing to pay extra for **New Hampshire-grown/made** agricultural products?

___ Yes ___ No – skip to # 11

If “Yes”:

a. Why? (Please check all that apply)

___ Better value
___ Fresher
___ Support local economy
___ Other:____

b) Approximately how much of a “premium” (percent increase) are you willing to pay compared to non-NH products?________% more than non-NH products.

NH EXPERIENCES

11. In which of the following activities have you participated while in New Hampshire? Please check all that apply.
How interested might you be in participating in such activities in the future? Use a scale

of 1 to 5, where “5" = “Very Interested”.

	Future Interest Scale					
	None					Very
___ Sleigh/hay rides		1	2	3	4	5
___ Cider making		1	2	3	4	5
___ Apple/berry picking		1	2	3	4	5
___ Farm Stay/Tours	1	2	3	4	5	
___ Other:____________________	1	2	3	4	5	

RESPONDENT INFORMATION

12. What is the Zip Code/Postal Code for the location of your primary residence?

____

13. What is your approximate annual household income?

___ less than $20,000 ___ $35,000-$49,999 ___ $75,000-$99,999

___ $20,000-$34,999 ___ $50,000-$74,999 ___ $100,000-$149,999

___ $150,000 or more

14. Which of the following categories represents your age?

__ 18-24 __ 25-34 __ 35-49 __ 50-64 __ 65 or more

15. Are you __ male __ female

THANK YOU VERY MUCH FOR YOUR TIME AND INPUT!

Interviewer:____________________Date:______

Location:____________________________

ECONOMIC IMPACT OF AGRICULTURAL TOURISM